Enterprise Configuration Management Implementation

FSA Technology Handbook Change Management Process Guide
March 28, 2002
Draft Version 0.3

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1.0   Technology Handbook Change Management Process

1.1   Purpose

The Federal Student Aid (FSA) Technology Handbook (TH) provides a web-resident knowledge base containing all FSA Information Technology (IT) authorized policies, standards, processes, procedures, contacts, services and information that is user friendly, personalized, interlinked with relevant content, searchable and easily navigated.

The Technology Handbook (TH) Change Management Process describes in a workflow diagram and in process step descriptions the steps for managing a change request received by the TH.

1.2   Process Definition and Context

This process guide addresses the need for a formalized change management process to standardize how changes are made to the TH. This guide is intended as resource for those who want to make a change to the TH, as well as those who actually process and implement changes. The roles involved in each process step are listed in Section 1.6, Process Workflow Descriptions.

The Change Request flows through the process and is worked on by resources throughout the process.
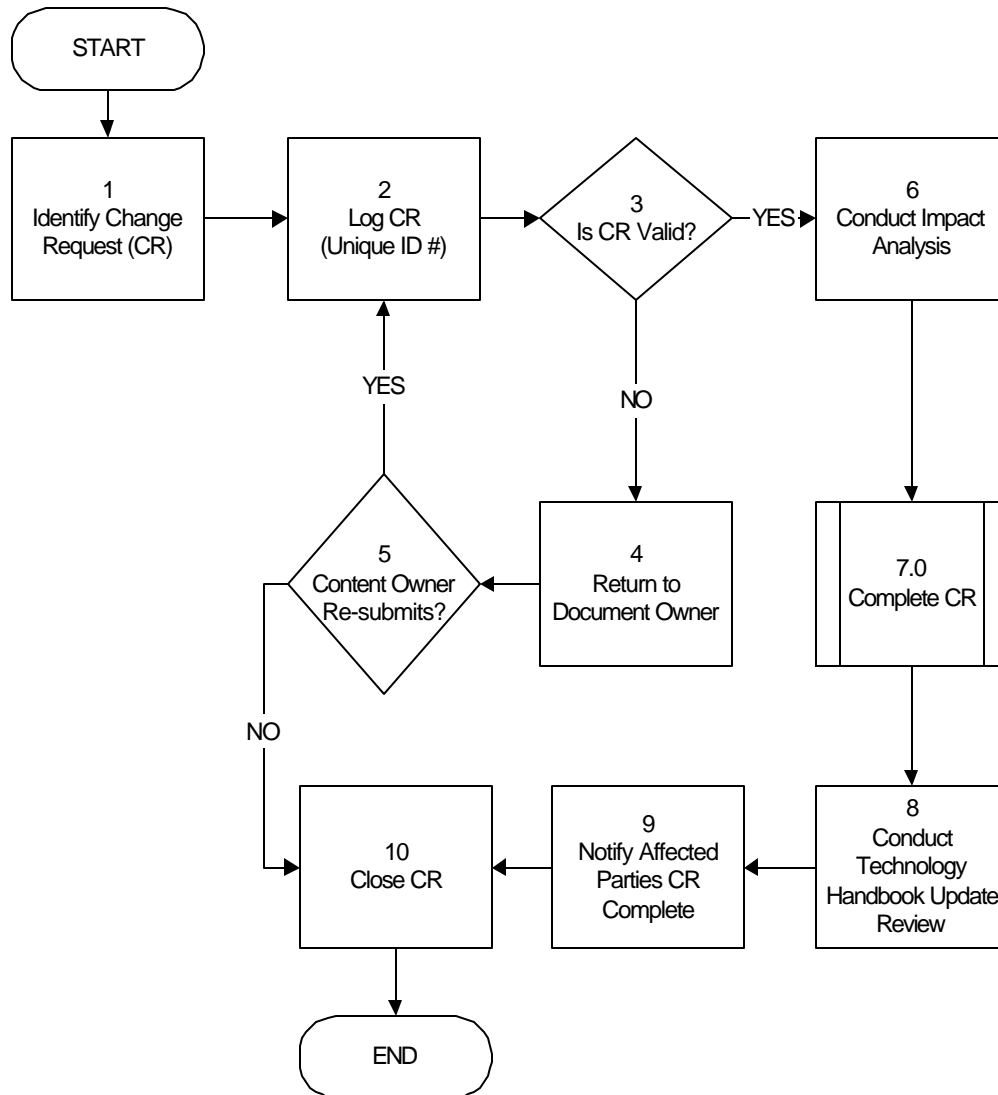
1.3   Benefits

The benefits of this Change Management Process include:

❑   Efficient and reusable process for change requests to the TH.

❑   Documented history of each change to the TH
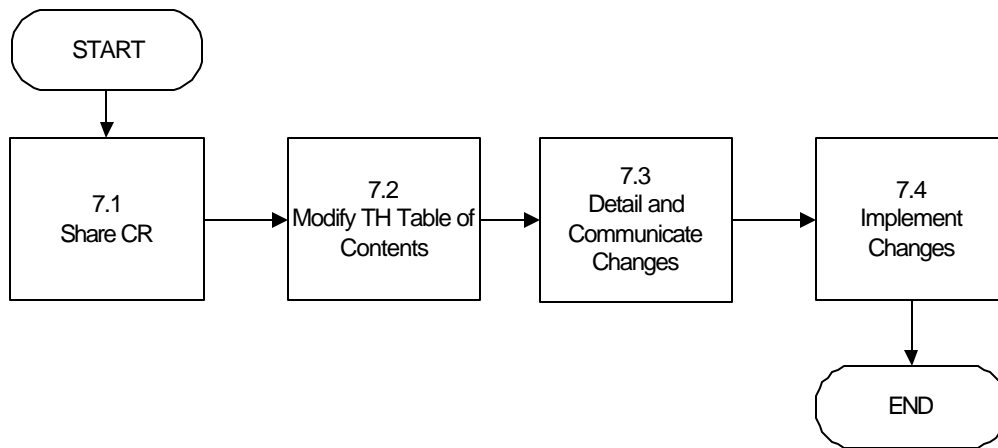
1.4 Process Workflow

The following process steps are described in the table in Section 1.6. The predefined sub-process 7.0, Complete Change Request, is detailed in section 1.5.

```
                          START
                            │
                            ▼
   ┌──────────────┐   ┌──────────────┐      ◇             ┌──────────────┐
   │      1       │   │      2       │    ╱ 3 ╲            │      6       │
   │   Identify   │──▶│   Log CR     │──▶◇ Is CR ◇─YES─▶  │Conduct Impact│
   │    Change    │   │ (Unique ID #)│    ╲Valid?╱        │   Analysis   │
   │ Request (CR) │   │              │      ◇             │              │
   └──────────────┘   └──────────────┘      │             └──────────────┘
                            ▲               NO                   │
                           YES              │                    ▼
                            │               ▼             ┌──────────────┐
           ◇             ┌──────────────┐                 │     7.0      │
         ╱ 5 ╲           │      4       │                 │  Complete CR │
       ◇Content◇◀────────│  Return to   │                 │              │
       ◇ Owner ◇         │  Document    │                 └──────────────┘
        ╲Re-  ╱          │    Owner     │                        │
      ╲submits?╱         └──────────────┘                        ▼
           │                                             ┌──────────────┐
          NO      ┌──────────┐  ┌──────────────┐         │      8        │
           │      │    10    │  │      9       │         │   Conduct     │
           └─────▶│ Close CR │◀─│Notify Affected│◀───────│  Technology   │
                  │          │  │  Parties CR  │         │Handbook Update│
                  └──────────┘  │   Complete   │         │    Review     │
                       │        └──────────────┘         └──────────────┘
                       ▼
                     END
```

1.5   Sub-Process Workflow

Subprocess 7.0
(Complete Change Request)

```
  ┌─────────┐
  │  START  │
  └────┬────┘
       │
       ▼
┌───────────┐    ┌─────────────┐    ┌─────────────┐    ┌─────────────┐
│           │    │     7.2     │    │     7.3     │    │     7.4     │
│    7.1    │───▶│ Modify TH   │───▶│ Detail and  │───▶│  Implement  │
│  Share CR │    │  Table of   │    │ Communicate │    │   Changes   │
│           │    │  Contents   │    │   Changes   │    │             │
└───────────┘    └─────────────┘    └─────────────┘    └──────┬──────┘
                                                              │
                                                              ▼
                                                         ┌─────────┐
                                                         │   END   │
                                                         └─────────┘
```

1.6   Process Workflow Description

Step #	Step Description	Responsibility	Tools	Deliverables/ Outcomes
Start				

1.	*Identify Change Request (CR)*
	 CR is identified as one of 3 types of changes:
	     Update a document
	     Add a document
	     Delete a document
	 The location of the change within the TH is identified.
		Content Owner		

2.	*Log CR Unique ID #* The CR is logged and given a unique identification number	Content Owner		
3.	*Is CR Valid?* The TH Coordinator determines whether or not the CR is complete and valid, according to the TH standards (TBD)	TH Coordinator		
4.	*Return to Content Owner* The CR is returned to the Content Owner if the CR is found to be incomplete or does not conform to TH standards.	TH Coordinator		
5.	*Content Owner Re-submits?* The Content Owner can decide to revise and re-submit the CR. Or, if it is not re-submitted, the CR is closed.	Content Owner		
6.	*Conduct Impact Analysis* An impact analysis is conducted to determine where, how and in what format the document will be housed in the TH and what impact it will have on existing material in the TH.	TH Coordinator & Content Owner		
7.	*Complete CR* The TH Coordinator and the SFA Net Content Coordinator share responsibility for completion of the CR. (See sub-process steps 7.1 – 7.4 below.)	TH Coordinator & SFA Net Content Coordinator		
7.1	*Share CR* Place the CR onto a shared drive into a directory accessible to the FSA Net Content Coordinator.	TH Coordinator		
7.2	*Modify TH Table of Contents* Make appropriate changes in the Table of Contents	TH Coordinator		

Step #	Step Description	Responsibility	Tools	Deliverables/ Outcomes
7.3	*Detail and Communicate Changes* The TH Coordinator will list the changes to the document as outlined in step 6, *Conduct Impact Analysis* and communicate them to the FSA Net Content Coordinator.	TH Coordinator		
7.4	*Implement Changes* FSA Net Content Coordinator makes the changes as listed and notifies the TH Coordinator upon implementation.	FSA Net Content Coordinator		
8.	*Conduct TH Update Review* TH Coordinator reviews the changes made by FSA Net Content Coordinator.	TH Coordinator		
9.	*Notify Requestor CR Complete* Email requestor re: completion of CR Update log Notify other affected parties Validate FSA Net Updates (use What's New Section?)	TH Coordinator		
10.	*Close Request* The CR is formally closed and the log is updated.	TH Coordinator		
End				